

2019-20 Program Guidelines Toward EXcellence, Access, & Success Grant (TEXAS Grant)



Student Financial Aid Programs
Texas Higher Education Coordinating Board

TABLE OF CONTENTS

TOWARD EXCELLENCE, ACCESS AND SUCCESS GRANT	1
Program Authority and Purpose (19 TAC, Section 22.225)	1
State Priority Deadline (TEC, Section 56.008 and 19 TAC, Section 22.6)	1
Eligible Institutions (19 TAC, Section 22.227)	1
ELIGIBILITY	2
Initial Eligibility Requirements (19 TAC, Section 22.228)	2
Renewal Eligibility Requirements (19 TAC, Section 22.228)	3
Controlled Substance Restrictions (19 TAC, Section 22.230)	3
Selective Service Statement (19 TAC, Section 22.3)	4
Discontinuation of Eligibility (19 TAC, Section 22.230)	5
Hardship Provisions (19 TAC, Section 22.231)	5
Satisfactory Academic Progress (SAP) (19 TAC, Section 22.229)	6
AWARDING	6
Priority Award Model Requirements (19 TAC, Section 22.228)	7
Required Matching (19 TAC, Section 22.234)	7
Over Awards (19 TAC, Section 22.234)	8
Late Disbursements (19 TAC, Section 22.235)	8
Proration (19 TAC, Section 22.234)	8
PROCESSING FUNDS	8
Requesting Program Funds	8
Returning Program Funds	9
Authority to Transfer Funds (19 TAC, Section 22.239)	9
APPENDIX 1: QUICK REFERENCES	10



TOWARD EXCELLENCE, ACCESS AND SUCCESS GRANT

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.225](#))

The Toward EXcellence, Access, & Success (TEXAS) Grant Program is authorized by [TEC Chapter 56, Section 56.302 Subchapter M](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter L](#). The program is funded by appropriations authorized by the Texas Legislature and from any gifts and grants to the program. The purpose of the TEXAS Grant Program is to provide financial assistance to eligible students attending Texas public institutions of higher education.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008](#) and [19 TAC, SECTION 22.6](#))

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas, as defined in [TEC, Section 61.003\(3\)](#), must publicize and use **January 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.227](#))

With the exception of public state colleges, GATIs and Health-Related Institutions (HRIs) are eligible to make both initial year (IY) and renewal year (RY) awards from a single allocation. Community colleges, public state colleges, and public technical institutes may only issue an RY award to students who received an IY award prior to fall 2014 through a community college, public state college, or public technical institute.

ELIGIBILITY

INITIAL ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.228](#))

TO RECEIVE AN IY AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have applied for any available financial aid assistance
- ✓ Have financial need
- ✓ Be enrolled at least 3/4 time
- ✓ Not have earned a baccalaureate degree
- ✓ Be enrolled in a baccalaureate degree program at a public 4-year or HRI as a first-time undergraduate and qualify through one of the following four pathways:
 - **High School Graduation Pathway:** Graduation from an accredited public or private high school in Texas and enrollment at an approved institution within 16 months after high school graduation. The student must not have accumulated more than 30 semester credit hours (SCHs) (excluding credits for dual enrollment or by examination); **OR**
 - **Associate Degree Pathway:** Enrollment in an eligible institution within 12 months after earning an associate degree from a public or private nonprofit Texas institution of higher education; **OR**
 - **Honorable Military Discharge Pathway:** Enrollment in an eligible institution of higher education within 12 months after being honorably discharged from military service. Enlistment in the military must have occurred within 12 months after graduation from an accredited public or private high school in Texas on May 1, 2013 or later; **OR**
 - **TEOG Transfer Pathway:** Completion of at least 24 SCHs with a minimum 2.5 GPA after receiving an IY Texas Educational Opportunity Grant (TEOG) in Fall 2014 or later and transferring to an eligible institution with a minimum 2.5 GPA.
- ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act)

ALERT NEW: Priority Expected Family Contribution (EFC)

The **priority EFC** set by the THECB should only serve as a method for prioritizing IY awards for eligible students, and is not an eligibility requirement to receive an award. The calculated priority EFC for 2019-20 is **\$5,875** ([See 19 TAC, Section 22.228\(e\)](#)).

ADDITIONAL INFORMATION

HIGH SCHOOL RECIPIENT

Home-schooled students are not eligible for an initial award though the **High School Graduation Pathway**. Only students who graduated from an accredited public or private high school in Texas are eligible for TEXAS Grant consideration as an initial applicant.

PRIVATE HIGH SCHOOL CERTIFICATION

To determine eligibility for a student who graduated from a private high school in Texas, the institution of higher education must receive a certification form from the accredited private high school. This form verifies that the student completed the equivalent of the required high school curriculum. The [private high school certification form](#) is located on the THECB's website.

TRANSFER STUDENTS

A student who is eligible through either the **Associate Degree** or **TEOG Transfer Pathway** does not need to have his or her high school transcripts evaluated, but cannot receive priority consideration for an initial TEXAS Grant award.

RENEWAL ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.228](#))

TO RECEIVE AN RY AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Be enrolled at least 3/4 time
- ✓ Maintain satisfactory academic progress
- ✓ Not have earned a baccalaureate degree
- ✓ Be a prior recipient of a TEXAS Grant award who is an undergraduate enrolled at a public institution who qualifies through one of the following three pathways:
 - Is enrolled as an undergraduate at a public 2-year institution and previously received a TEXAS Grant IY award **prior** to fall 2014 at a public 2-year institution; **OR**
 - Is enrolled as an undergraduate in a baccalaureate program at a public 4-year institution or HRI and previously received a TEXAS Grant IY award **prior** to fall 2014 at a public 2-year institution, 4-year public institution, or HRI ; **OR**
 - Is enrolled as an undergraduate in a baccalaureate program at a public 4-year institution or HRI and received a TEXAS Grant IY award in fall 2014 or later.
- ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act)

CONTROLLED SUBSTANCE RESTRICTIONS ([19 TAC, SECTION 22.230](#))

Institutions are required to collect a statement (electronic or paper) from each TEXAS Grant recipient prior to the disbursement of funds confirming eligibility in regard to the controlled substance restrictions of the program. This statement must be retained with the student’s records at the institution and be made available if requested in the course of a program review or audit. Each statement must be retained for 7 years after the students completion of the award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

The institution has the flexibility to determine the wording of the statement and the frequency with which it is collected. A **sample** statement is provided below:

Statement of Student Eligibility

Have you ever been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code?

_____ Yes* _____ No**

* If your answer is yes, contact the financial aid office to determine your eligibility to receive a TEXAS Grant.
** If your answer is no, it is your responsibility to inform the financial aid office if this status changes at any time while attending the institution.

I hereby certify that the information I have provided in this statement is true and correct. I understand that if I fail to provide accurate information, I may be required to reimburse the institution and penalties may be imposed. I also understand that it is my responsibility to inform the financial aid office if my status concerning this statement of eligibility changes at any time while attending this institution.

Student Signature

Date

A student is not eligible to receive a TEXAS Grant award if convicted of a felony or an offense under the law in any jurisdiction involving a controlled substance as defined in [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act), unless he or she meets **all** other eligibility requirements and **one** of the following conditions exists:

- A certificate of discharge by the Texas Department of Criminal Justice or a correctional facility has been issued or the student completed a period of probation ordered by a court, and at least two years have elapsed from the date of the receipt, or completion; **or**
- The student has been pardoned or the record of the offense has been expunged from the student’s record and therefore the student has been released from the resulting ineligibility to receive a TEXAS Grant.

NOTE: Institutions should consult with their legal counsel concerning questions about individual cases.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

In accordance with [TEC, 51.9095](#), male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A **Selective Service Status Statement** is not required when a student’s registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student’s signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged “not registered” on the ISIR, the institution must determine the student’s status.
 - o If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
 - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student’s circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student’s status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status statement and all documentation must be retained in the student’s record and be made available if requested during a program review or audit. Each status statement collected must be retained with the student’s records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

REPROCESSED ISIRS

If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered

(Proof of registration required)

Not Registered

Exempt

(Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation, if requested by my institution, and that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature

Date

DISCONTINUATION OF ELIGIBILITY ([19 TAC, SECTION 22.230](#))

Unless an extension of eligibility (due to a hardship circumstance) is granted, a student’s eligibility ends if any of the following maximums have been met, or the student earns a baccalaureate degree, whichever comes first.

PATHWAY	IF ENROLLED IN A DEGREE PLAN OF 4 YEARS OR LESS	IF ENROLLED IN A DEGREE PLAN OF MORE THAN 4 YEARS	ATTEMPTED HOURS**	HOURS WHILE RECEIVING GRANT FUNDS
INITIAL RECIPIENT BY: <ul style="list-style-type: none"> • ASSOCIATE DEGREE 	3 years from the first semester awarded	4 years from the first semester awarded	150 SCH	90 SCH No hardship allowed
INITIAL RECIPIENT BY: <ul style="list-style-type: none"> • HIGH SCHOOL GRADUATE • TEOG TRANSFER • MILITARY DISCHARGE 	5 years from the first semester awarded	6 years from the first semester awarded	150 SCH	150 SCH No hardship allowed

****Attempted hours** is defined as every course in every semester for which a student has been registered as of the official census date. This includes, but is not limited to, repeated courses, courses the student drops, or those from which the student withdraws. Transfer hours and hours for optional internship and cooperative education courses are included if they are accepted by the receiving institution as counting towards the student’s current program of study (See [19 TAC, Section 22.230](#)).

HARDSHIP PROVISIONS ([19 TAC, SECTION 22.231](#))

A student who is ineligible for a TEXAS Grant based on the requirements for the grade point average (GPA), number of completed hours, and total hours enrolled may be deemed eligible under a hardship provision. Each institution must adopt a hardship policy and have the policy available for public review. All hardship decisions must be documented in the student’s record and be available for submission to the THECB, if requested.

 **STOP:** A prorated award may be issued to a student who is enrolled in six to eight hours in the last two semesters of his or her degree program. However, no student enrolled for fewer than six hours may receive a TEXAS Grant award, regardless of the circumstances, including graduation.

SATISFACTORY ACADEMIC PROGRESS (SAP) ([19 TAC, SECTION 22.229](#))

At the end of the first academic year, a student must meet SAP requirements set by the institution to be eligible for a first RY award.

At the end of the second academic year, and all subsequent years, a student must have completed 24 SCHs and have a minimum 2.5 cumulative GPA or its equivalent.

The chart below reflects these requirements, which must be monitored to ensure compliance:

ACADEMIC YEAR	SAP REQUIREMENTS	
END OF 1ST ACADEMIC YEAR	Institution SAP policy	
END OF 2ND ACADEMIC YEAR AND ALL SUBSEQUENT YEARS	Complete 24 SCH in the most recent academic year	2.5 cumulative GPA on a 4-point scale or its equivalent

NOTE: A student who does not meet the GPA requirement at the end of a spring term may appeal to have courses taken at other institutions included in the GPA calculation. In this case, all grade points previously earned must be included in the overall GPA calculation. If the resulting GPA meets or exceeds the program’s academic progress requirement, an otherwise eligible student may receive an award in the following term.

AWARDING

If allocated funds are insufficient to award all eligible students, first priority must be given to students who are eligible for an RY award (See [19 TAC, Section 22.232](#)).

After all eligible RY awards have been funded; remaining allocated funds should be awarded to IY students in a manner that acknowledges the Priority Model and priority deadline expectations:

- Students meeting the Priority Model requirements who also meet the **January 15** state priority deadline should be awarded first.
- If funding remains, the next students to be awarded are those who met the **January 15** state priority deadline, but who did not meet the Priority Model requirements.
- The balance of remaining funding can be awarded to any eligible student.

In determining who should receive an IY TEXAS Grant award, an institution must give highest priority to students who demonstrate the greatest financial need at the time the award is made (See [19 TAC, Section 22.233](#)).

Beginning in the 2018-19 award year, the reallocation process was eliminated. Institutions have until the close of business on **August 1** to request grant funding (or the first working day thereafter if it falls on a weekend or holiday). Extending the award year through August allows institutions to award students attending the summer terms, if otherwise eligible. Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

ADDITIONAL INFORMATION

FIRST YEAR APPEALS

If a student completes the first year on academic warning, probation, or on an approved plan, the student can be considered meeting SAP, if the institution’s policy includes such provisions. However, at the end of the second year, the student must meet the program SAP requirements for continued eligibility, unless deemed eligible by the institution under a hardship provision.

FAILING COURSES

The intent of the 24 SCH requirement is to encourage timely progression towards a degree. Since a grade of **F** is not earned toward a degree, it should not be considered when calculating the student’s completed hours.

TEXAS Grant Semester Maximum

Students receiving a TEXAS Grant cannot exceed the **semester** maximum for fall, spring, and summer.

- The award maximum is \$4,896 per semester.
- A student could receive up to \$14,688 for the 2019-20 award year.
- Target awards are still encouraged (\$2,500 per semester = up to \$7,500).

TEXAS GRANT 2019-20 AWARD MAXIMUMS				
INSTITUTION TYPE	YEAR MAX	SEMESTER MAX	TARGET YEAR MAX	TARGET SEMESTER MAX
PUBLIC UNIVERSITIES, HRIS	\$14,688	\$4,896	\$7,500	\$2,500

PRIORITY AWARD MODEL REQUIREMENTS ([19 TAC, SECTION 22.228](#))

To receive priority consideration for an IY award through the TEXAS Grant program, an eligible student must meet at least **one** high school graduation requirement in **at least two** of the following **four** areas:

AREA	HIGH SCHOOL GRADUATION REQUIREMENTS
ADVANCED ACADEMIC PROGRAM	<ul style="list-style-type: none"> • 12 Hours of College Credit (Dual Credit or AP Courses), • Complete the Recommended or Advanced High School Program or its equivalent • Complete the International Baccalaureate (IB) Program
TSI READINESS	<ul style="list-style-type: none"> • Meet the Texas Success Initiatives (TSI) assessment thresholds or qualify for an exemption
CLASS STANDING	<ul style="list-style-type: none"> • Graduate in the top 1/3 of the HS graduating class • Graduate with a GPA of at least 3.0 on a 4-point scale or the equivalent
ADVANCED MATH	<ul style="list-style-type: none"> • Complete at least one math course beyond Algebra II • Complete at least one advanced career and technical or technical applications course, as determined by the Texas Education Agency (TEA)

REQUIRED MATCHING ([19 TAC, SECTION 22.234](#))

Institutions are required to match any tuition and required fees that are not covered by the amount of the TEXAS Grant using other non-loan funds from federal, state, institutional, or outside sources. Funds used for this purpose are frequently referred to as “matching funds”.

⚠️ ALERT: A **Required Fee**, for the purpose of administering the TEXAS Grant Program, includes mandatory fees (required by statute) or discretionary fees (authorized by statute, imposed by the governing board of an institution) and fees that an institution charges to a student as a condition of enrollment at the institution or in a specific course.

OVER AWARDS ([19 TAC, SECTION 22.234](#))

If an award has been disbursed and a student receives other assistance that exceeds the student’s financial need, the institution is not required to adjust the award unless the sum of the excess resources is greater than \$300.

LATE DISBURSEMENTS ([19 TAC, SECTION 22.235](#))

Funds that are disbursed after the end of a student’s period of enrollment must be used either to pay the student’s outstanding balance for the period of enrollment, or to make a payment on an outstanding loan received during that period of enrollment. Under no circumstances should funds be released directly to the student in this situation.

PRORATION ([19 TAC, SECTION 22.234](#))

Award amounts must be prorated under the following circumstances:

- Student is enrolled less than 3/4 time, but at least 1/2 time, with an extension of eligibility (due to a hardship circumstance).

HARDSHIP PRORATION SCHEDULE	Divide the Maximum award for the semester by 12 and multiply by the number of hours enrolled (6-8 hours)
------------------------------------	--

- The balance of either total attempted hours **or** eligible program hours while receiving grant funds is less than the total number of hours the student is enrolled.

BALANCE OF TOTAL ATTEMPTED HOURS (150 SCH)	Balance of hours = 6-8 hours: 50% of the maximum award Balance of hours = 1-5 hours: 25% of the maximum award
BALANCE OF ELIGIBLE PROGRAM HOURS (150 OR 90 SCH)	

For Example: A student has 147 hours and 3 eligible hours remaining. The 3 hours would be prorated using the chart above.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

When requesting funds, institutions must submit a [Funds Request Form \(FRF\)](#). This form is available through the secure Coordinating Board Pass System (CBPASS) portal on the Student Financial Aid Programs (SFAP) Information Webpage.

Institutions have until the close of business on **August 1** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds (See [19 TAC, Section 22.236](#)).

Each biennium, funds not requested in the first year can be carried forward for use in the second year. Any funds not requested in the second year of the biennium become available for redistribution as determined by the THECB.

 **DEFINITION:** A biennium is the two-year state budget period.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted and approved before any funds are returned to the THECB. This form is available on the SFAP Information Webpage under **Online Resources**.

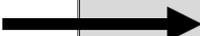


STOP: TIMELY DISTRIBUTION OF FUNDS ([19 TAC, Section 22.2](#))

- Institutions have **3** business days after receiving the funds to apply the funds to a student’s account.
- Institutions have **6** business days after receiving the funds to return undisbursed funds.
- Institutions have **45** calendar days from the date a student becomes ineligible to return disbursed funds.
- Institutions have **120** calendar days to return funds after a student has notified the institution of a decision to cancel the award.

AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.239](#))

Institutions participating in TEXAS Grant and Texas College Work-Study (TCWS) may transfer up to 10% of the institution’s total annual program allocation or \$20,000 (whichever is less) between programs within the relevant fiscal year. Institutions requesting a transfer between programs must submit an online inquiry by the deadline listed below through [CONTACT US](#) (select the “Financial Aid Question” option in the drop-down selection under Contact Reason). The Financial Aid Services staff will respond to the institution to provide next steps for the process.

TRANSFER FROM:	TRANSFER TO:	AUTHORITY TO TRANSFER REQUEST DEADLINE DATE
TEXAS Grant	 TCWS	JANUARY 18
OR		
TCWS	 TEXAS Grant	JUNE 14

Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.

APPENDIX 1: QUICK REFERENCES

CONTACT FINANCIAL AID SERVICES	
By phone: (844) 792-2640	
Contact us by completing an online inquiry form and select "Financial Aid Question" as the Contact Reason.	
OTHER RESOURCES FOR INSTITUTIONS	
General program information for institutions	Student Financial Aid Programs Information Webpage
General loan information	HHloans
Texas Program Statutes	Texas Education Code
Texas Program Rules	Texas Administrative Code
Information concerning programs, procedures, allocations, and other topics will be communicated to institutions through the GovDelivery system. To receive these communications, interested individuals must subscribe.	GovDelivery
AVAILABLE FORMS	
An online form is required to request grant program funds.	Funds Request Form
Directors of Financial Aid must submit a form to add, update or remove a user's access to state financial aid web portals through the THECB.	System Authorization Form
A form is required when returning funds for all state grant, scholarship, Educational Aide Exemption, and loan program funds.	Grants and Special Programs Online Return of Funds Form Loan Programs Online Return of Funds Form
CALENDAR	
Institutional Calendar	